

AVIATION FOCUS

Q3-2020 Seat Capacity

AUSTRALIA

Departure City	Seat Capacity Q3-2020 vs Q3-2019
Adelaide	19.0%
Brisbane	27.8%
Canberra	9.5%
Darwin	30.0%
Melbourne	5.1%
Perth	31.0%
Sydney	10.5%

4D Analytics : Q3-2020 airline seats offered per destination as a % of Q3-2019
Source Data : Cirium

NEW ZEALAND

Departure City	Seat Capacity Q3-2020 vs Q3-2019
Auckland	61.0%
Christchurch	68.9%
Dunedin	64.5%
Napier	53.4%
Palmerston	50.6%
Rotorua	64.6%
Wellington	66.9%



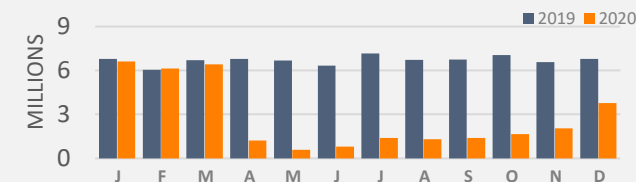
AUSTRALIA

Q3-2020 Seats
4.1M

Offered on the Domestic AU Network
Note a correction was made to the Q2-2020 report which reported \$2.6M seats offer

Domestic airline seats offered in Q3-2020 rose to a national average of **19.8%** of the seat volumes in Q3-2019, and increased **+10.8%** on Q2-2020 seats. Seats offered continue to grow as state borders ease as the nations health improves.

NOV-20 seats rose to **31.0%** compared to NOV-19.



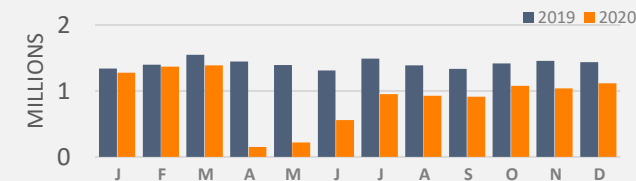
NEW ZEALAND

Q3-2020 Seats
2.8M

Offered on the Domestic NZ Network

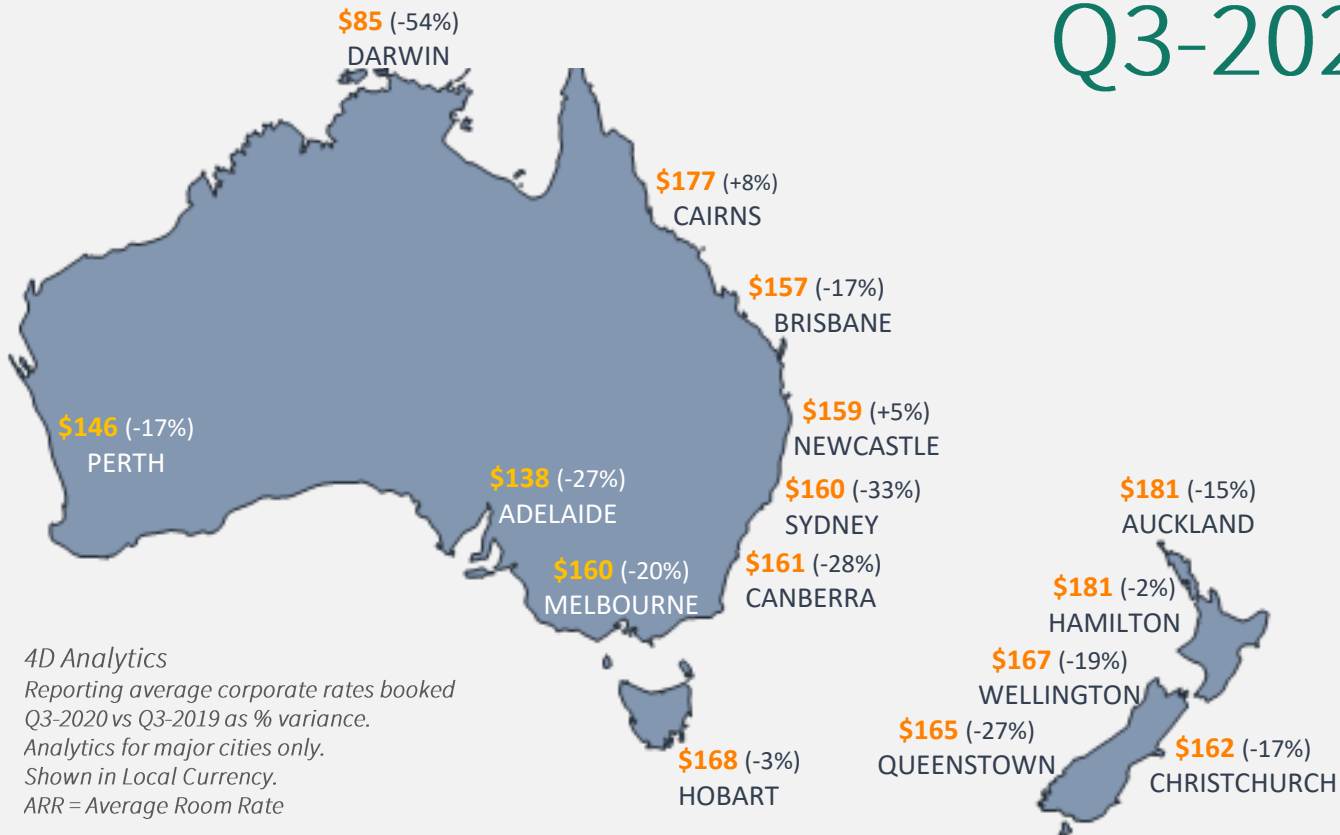
Domestic airline seats offered in Q3-2020 continued to increase to a national average of **67%** of the seat volume in Q3-2019 and sharply increased by **+44%** on Q2-2020.

NOV-20 capacity is **71.4%** compared to NOV-19.



ACCOMMODATION FOCUS

Q3-2020 Average Room Rates



4D Analytics
 Reporting average corporate rates booked
 Q3-2020 vs Q3-2019 as % variance.
 Analytics for major cities only.
 Shown in Local Currency.
 ARR = Average Room Rate

Q3-2020 ARR
 AU **\$150**

Q3 ARR reduced -\$36
 compared to same
 period in 2019

AUSTRALIA

- Intrastate business trips and leisure staycations fuelled regional hotel occupancy levels to sit **+20%** higher than key city locations during Q3. Hotel occupancy is set to grow in Q4-2020 and Q1-2021 due to business and summer holiday travel.
- YR ending SEP-20 National Occupancy **52% (-30%** on previous year).

Q3-2020 ARR
 NZ **\$171**

Q3 ARR decreased -\$34
 compared to same
 period in 2019.

NEW ZEALAND

- Corporations continued to travel during Q3, with Construction, Utilities and FMCG industries leading the charge. Domestic business travel bookings are averaging **60%** of 2019 travel volumes, higher than Australia (**20-30%**) in Q3.
- Q3-2020 National hotel occupancy **50-70%**.